



BUSINESS WAREHOUSE

**CORE FINANCIAL
BUSINESS WAREHOUSE**

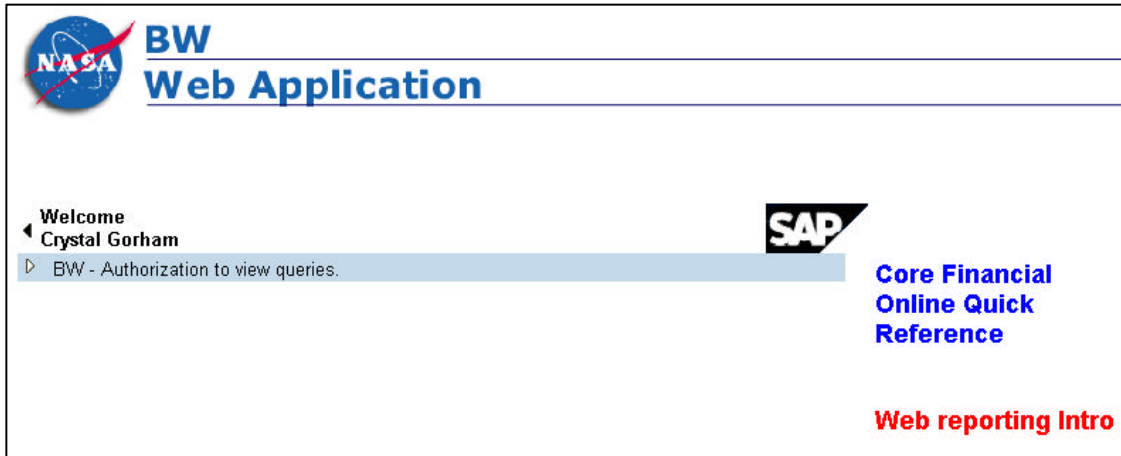


<https://bwprod01.ifmp.nasa.gov/>

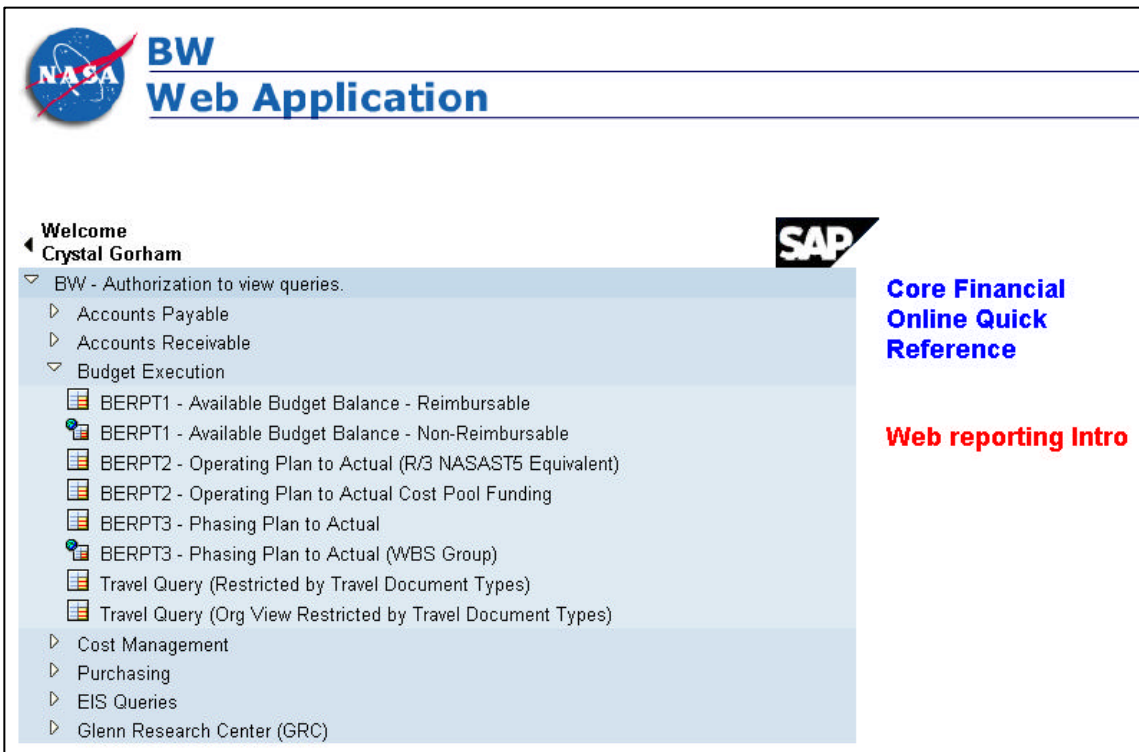
**BUSINESS AND ADMINISTRATIVE SYSTEMS OFFICE
(BASO)
202-358-IFMP (4367)**

EXERCISE: BW INTERFACE

1. Log-in.



2. Note the menu tree and how folders can be expanded or collapsed.



3. Note the reference materials available on the Menu Screen

Core Financial Online Quick Reference
Web Reporting Intro
Enhanced Web Printing Intro



EXERCISE:

BW INTERFACE (continued)

4. Execute PRRPT29 - Center Operational & Workload Status by Doc - FY

Note that the query executes in a new window, leaving the menu screen always available to run other reports.

5. Review Variables Entry Screen.

Variables for PRRPT29 - Center Operational & Workload Status by Doc - FY

Plant (Center)	[[]]	HQ	to		Include	Insert Row
Fiscal Year Range (*)	[[]]	2003	to		Include	Insert Row
Purchase Order(s)	[[]]		to		Include	Insert Row

Execute Check

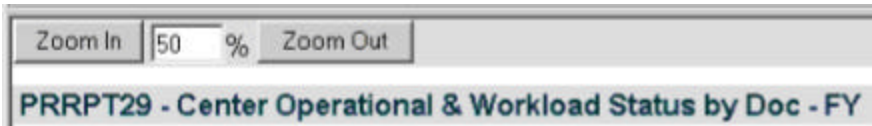
a b c d e

- a) Equal, Range, Greater Than, Less Than, * = Wildcard)
- b) Area for manually entering selection values
- c) Lookup Available Values
- d) Choose whether your selection will be included or excluded from the query
- e) Insert a new selection row for multiple selections per characteristic












EXERCISE:

BW INTERFACE (continued)

6. Note the Zoom In/Zoom Out feature and Report Title



7. Review the Tool Bar

	View in Table Format
	View in Chart Format Bar, Pie, Line, 3D Bar
	Swap Axes
	Report Information Variables, Information, Filters
	Exceptions Values in specified ranges can be color coded
	Conditions Displays key figures based on specified conditions
	Display Variable Entries Screen used to enter initial parameters
	Bookmark Saves custom queries for execution at a later time. Must add to IE Favorites after selecting Bookmark
	Export to Excel
	Export to CSV Delimited text
	Enhanced Web Printing Instructions available on the BW Menu Screen

EXERCISE:

BW INTERFACE (continued)

8. Review the Navigation block.

The Navigation block contains all Characteristics available for analysis in the current report.

Characteristics:

Fields that organize data and define levels of detail in the query.

Examples: Cost center, Fiscal year/period, Funds Center

Navigation block:

Cost center	Document Number	Fiscal year
Fiscal year/period	Functional area	Fund
Funds Center	G/L Account	Network
PR	Plant	Program Office
WBS element	HQ	
	Key Figures	


The Navigation block can be collapsed.

Key Figures:


Amounts or numerical values that can be summed or aggregated.

Examples: FY Comm Amt, FY FI Obs Amt, FY Cost Amt

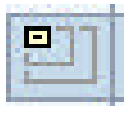
Drilldown in the Rows




Drilldown in the Columns




Remove Drilldown



Select Filter Value



Remove Filter



9. Review the Table Area.

First Page

Page Up

Page Down

Last Page

Plant	Document Number	FY Comm Amt	FY FI Obs Amt	FY Cost Amt	FY Disb Amt	FY Unob Comm
HQ	4500000048	\$ 80,076.30	\$ 80,076.30	\$ 80,076.30	\$ 0.00	\$ 0.00
	4500000049	\$ 1,221.41	\$ 1,221.41	\$ 1,221.41	\$ 0.00	\$ 0.00
	HCANCELLED	\$ 10,115,249.22	\$ 10,115,249.22	\$ 0.00	\$ 0.00	\$ 0.00
	IHW9239900	\$ 2,503,096.00	\$ 2,503,096.00	\$ 2,080,434.38	\$ 2,080,434.38	\$ 0.00
	NAG7-99001	\$ 357,721.00	\$ 357,721.00	\$ 357,721.00	\$ 357,721.00	\$ 0.00
	NAGW-952	\$ 1,050,003.14	\$ 1,050,003.14	\$ 1,048,003.14	\$ 1,048,003.14	\$ 0.00
	NAS14-305	\$ 12,615,265.08	\$ 12,615,265.08	\$ 12,615,265.08	\$ 12,615,263.95	\$ 0.00
	NAS5-26500	\$ 174,034,167.80	\$ 174,034,167.80	\$ 172,965,359.80	\$ 165,009,631.13	\$ 0.00

EXERCISE:

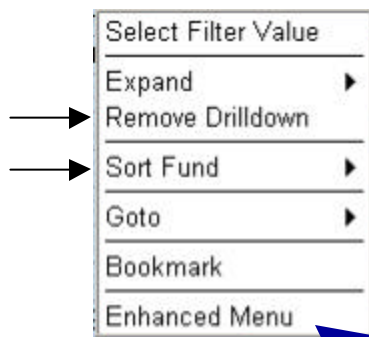
BW INTERFACE (continued)

10. Review the Context Menu:

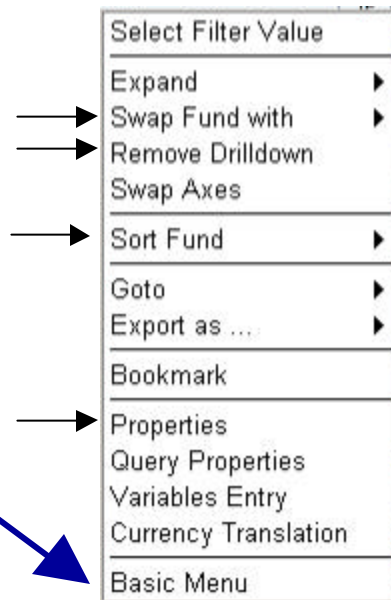
CLICK on the Funds Center title in the Navigation Block.

Toggle between Basic and Enhanced

BASIC MENU



ENHANCED



See the **Web Reporting Intro** for a detailed explanation of all options available under the Context Menu.



EXERCISE:

BW INTERFACE (continued)

11. Review Properties

CLICK on Funds Center in the Navigation block
Enhanced Menu | Properties

Funds Center

Display:

Sort by:

Sort Direction:

Suppress Results Rows:

Show Following Attributes

<input type="checkbox"/> Business area	<input type="text" value="Key and text"/>	<input type="text" value="1"/>
<input type="checkbox"/> Pers.Resp.Name	<input type="text" value="Key"/>	<input type="text" value="2"/>
<input type="checkbox"/> User Name	<input type="text" value="Key"/>	<input type="text" value="3"/>
<input type="checkbox"/> Budget Line Item (BL	<input type="text" value="Text"/>	<input type="text" value="4"/>
<input type="checkbox"/> Cognizant Sender Off	<input type="text" value="Text"/>	<input type="text" value="5"/>
<input type="checkbox"/> Secondary Lead Cente	<input type="text" value="Text"/>	<input type="text" value="6"/>
<input type="checkbox"/> Lead Center	<input type="text" value="Text"/>	<input type="text" value="7"/>
<input type="checkbox"/> Program Area	<input type="text" value="Text"/>	<input type="text" value="8"/>
<input type="checkbox"/> Program	<input type="text" value="Text"/>	<input type="text" value="9"/>
<input type="checkbox"/> Program Office	<input type="text" value="Text"/>	<input type="text" value="10"/>
<input type="checkbox"/> Subauthorization Rec	<input type="text" value="Text"/>	<input type="text" value="11"/>
<input type="checkbox"/> Cognizant Office (CI	<input type="text" value="Text"/>	<input type="text" value="12"/>

Display Hierarchy

☐ Active:

☐ Expansion Level:

Attributes:

Associated on a one-to-one basis with the selected Characteristic.

Example: BLI is an attribute of Funds Center

Note the following:

Display – Controls how the Characteristic is displayed. (Key, Key and Text, etc.)

Sort by – Specifies how to sort in the query. (By: Key, Text, or Attribute)

Sort Direction - Ascending, Descending

Suppress Results Rows – Controls sub-totals in the query. (Always, Never)

Attributes – Lists attributes available for reporting. Select as appropriate.

Hierarchy – Summarizes data in a hierarchical fashion. Select Active to activate.



EXERCISE:

BUDGET REPORT

1. Execute BERPT1 – Available Budget Balance – Non-Reimbursable

2. Enter Variables

Business Area 10

Fiscal Year = 2003

Fund = SAT292003D

(Insert Row)

Fund = HSF542003D

4. Remove the empty columns by filtering Key Figures.

Deselect:

Operating Plan, Budget BCF, Open Docs CF

5. Drill down on Funds Center and display Fund Center Name

Enhanced Menu | Properties

Display the Key and Text Name to Funds Center

6. Save as a Favorite

7. Export to both Excel and CSV

SAVING BOOKMARKS AS FAVORITES

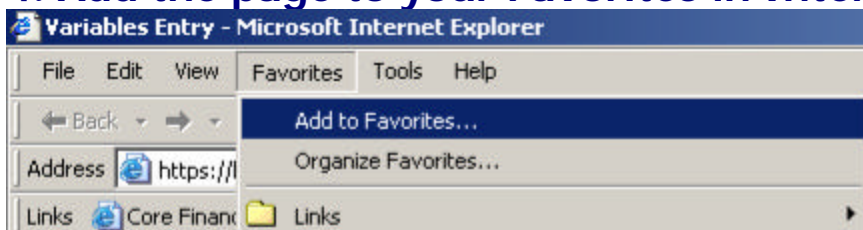
1. Customize the query as desired

2. Click on the Bookmark icon

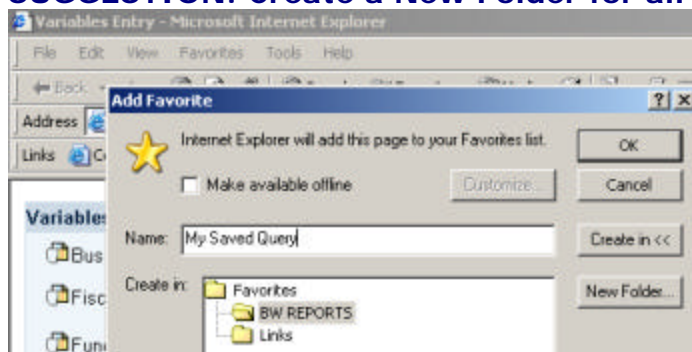


3. A Bookmark ID will be created in the URL.

4. Add the page to your Favorites in Internet Explorer.



SUGGESTION: Create a New Folder for all of your BW Favorites



Export Directly to Excel



1. From the Toolbar, click the Export to Excel Icon
2. Save Document as an Excel file and use the browser's **BACK** button to return to BW.

Export to Excel via CSV



1. From the Toolbar, click the Export to CSV Icon
2. Text will appear in an Excel sheet.
3. Highlight Column A
4. From the menu, select **Data | Text to Columns**
5. Original Data Type = Delimited - Click **NEXT**
6. Delimiters = Semicolon - Click **NEXT**
7. Click **FINISHED**
8. Save File as Excel and use the Browser's **BACK** button to return to BW.